

Sick Leave Pool - Donation and Withdrawal

PA30

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
6/20/07	Janet Pasion	Initial Draft
6/21/07	Lesa Terry	Training Team Supervisor review
6/27/07	Cathy Tarricone	SME review

Purpose

Use this procedure to maintain Sick Leave Pool donations for both the Donor and Recipient in HRMS.

Trigger

Perform this procedure when an eligible employee is donating to the Sick Leave Pool or when donating from the Sick Leave Pool to an employee in the same agency.

Prerequisites

- Both the Donor and Recipient must have the Home Pool and Foreign Pool created on the *Share Leave Eligibility* (WA) (0696). See OLQR procedure, Shared Leave Create Eligibility (Steps 15 – 21) and Sick Leave Pool – Create Eligibility.
- Sick Leave quota balance must exist for the donating employee AND must meet the requirements listed in WAC 357-31-580.

The following roles can view or maintain these infotypes:
Shared Leave Eligibility (0696) – Payroll Processor, Time & Attendance Processor, Leave Corrections Processor
Shared Leave Donation/Return (0613) – Payroll Processor, Leave Corrections Processor
Time Quota Compensation (0416) – Personnel Administration Processor/Supervisor, Payroll Processor/Analyst/Supervisor/Inquirer, Time & Attendance Processor/Supervisor, Leave Corrections Processor
Quota Corrections (2013) – Personnel Administration Processor/Supervisor/Inquirer, Payroll Processor/Analyst/Supervisor/Inquirer, Time & Attendance Processor/Supervisor/Inquirer, Leave Corrections Processor

Menu Path

Use the following menu path(s) to begin this transaction:

- Human Resources → Personnel Management → Administration → HR Master Data → Maintain

Transaction Code










PA30

Date	Procedure Update Log
7/9/07	Created

Helpful Hints

The Payroll Processor/Supervisor, Time & Attendance Processor/Supervisor/Inquirer and Leave Corrections Processor may use the Attendance System Change Report to verify the employee's absence quotas. To access this report, use the transaction code **ZHR_RPTTM084**.

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.


Procedure

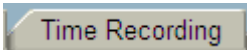
1. Start the transaction using the menu path above or transaction code **PA30**.


Maintain HR Master Data

2. Complete the following fields:

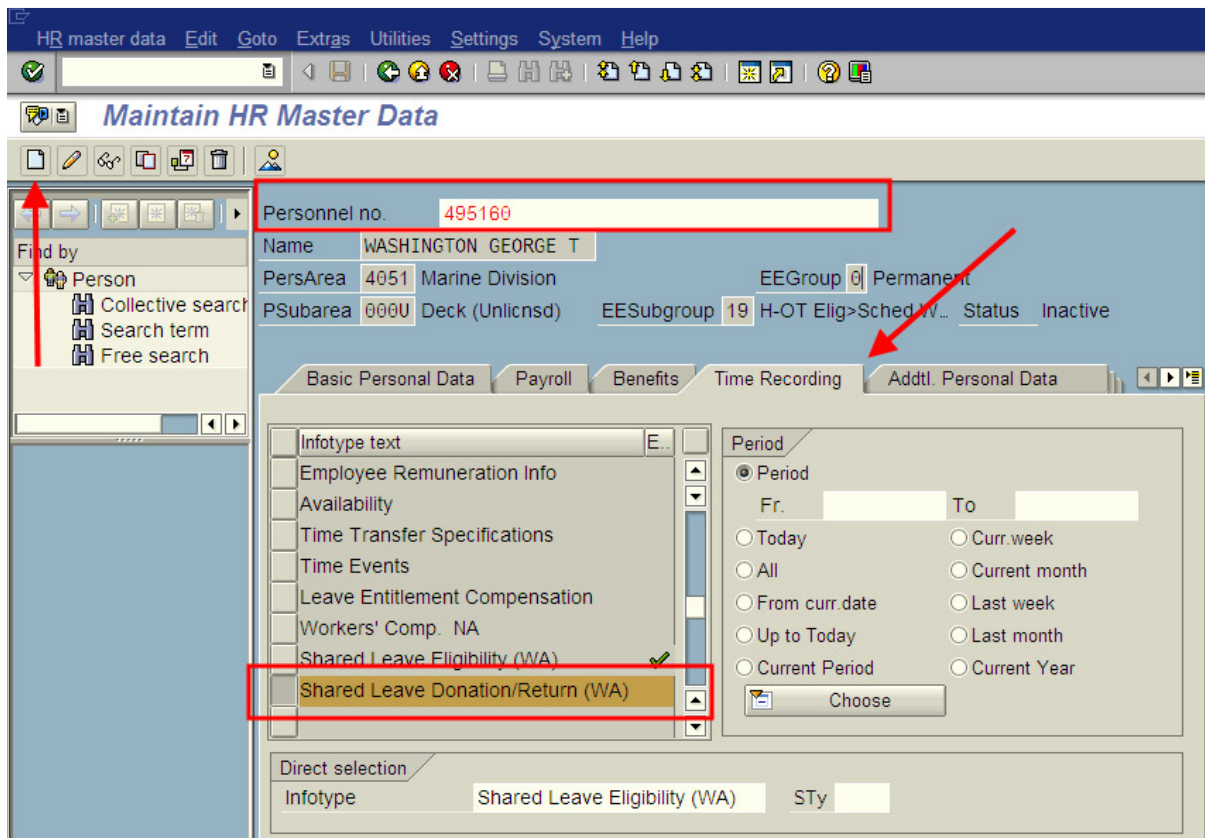
Field Name	R/O/C	Description
Personnel No.	R	This is a unique identifying number assigned by HRMS for identification purposes. This number will follow the employee throughout his/her employment with the State of Washington. This will replace the use of identifying employees by social security number. Example: 6634 (Janell Pasion)


3. Click  (Enter) to validate the information.

4. Click  tab.

5. Click the gray box to the left of  Shared Leave Donation/Return (WA) to select.

Maintain HR Master Data



6. Click  (Create) to create a new record.

Subtypes for infotype "Shared Leave Donation/Return (WA)" (1) 2 Entries found

S Typ	Name
0001	Donation/Return
0002	Withdrawal

7. Perform one of the following:



If	Go To
an employee is donating to the Sick Leave Pool	Step 8
an employee is receiving leave from the Sick Leave Pool	Step 14


8. Double-click **0001 Donation/Return** from the selection list.

Create Shared Leave Donation/Return (WA) (0613)

The screenshot shows the 'Create Shared Leave Donation/Return (WA) (0613)' form in the HRMS system. The form is titled 'Create Shared Leave Donation/Return (WA) (0613)' and includes a menu bar with options like Infotype, Edit, Goto, Extras, System, and Help. The main form area displays employee information for Pasion Janell B (Personnel No 6634) and includes fields for Start date (06/20/2007), Abs.quota type, Number/unit, Home Pool ID (0002 Shared Leave - Common Pool), and Foreign Pool ID. Red boxes highlight the Start date, Abs.quota type, Number/unit, and the Home/Foreign Pool selection area.

9. Complete the following fields:


Field Name	R/O/C	Description
Start	R	This is the date on which the record begins. Example: 06/20/2007
Abs.quota type	R	It is a specific absence quota, such as Annual Leave or Sick Leave.  Sick Leave would be the appropriate option. Example: 30 Sick Leave
Number/unit	R	This is a combination of fields that defines the number to be compensated and the time unit, such as hours, days, weeks, etc.  Enter the amount of hours to be donated. Example: 8.0 (hours)

Field Name	R/O/C	Description
Foreign Pool ID	R	<p>For employees to be eligible to donate or receive shared sick leave, each should be assigned to a Foreign Pool ID.</p>  <p>This should be selected before clicking the Foreign Pool radio button. Sick Leave Pool would be the appropriate option.</p> <p>Example: 9000 Sick Leave Pool</p>

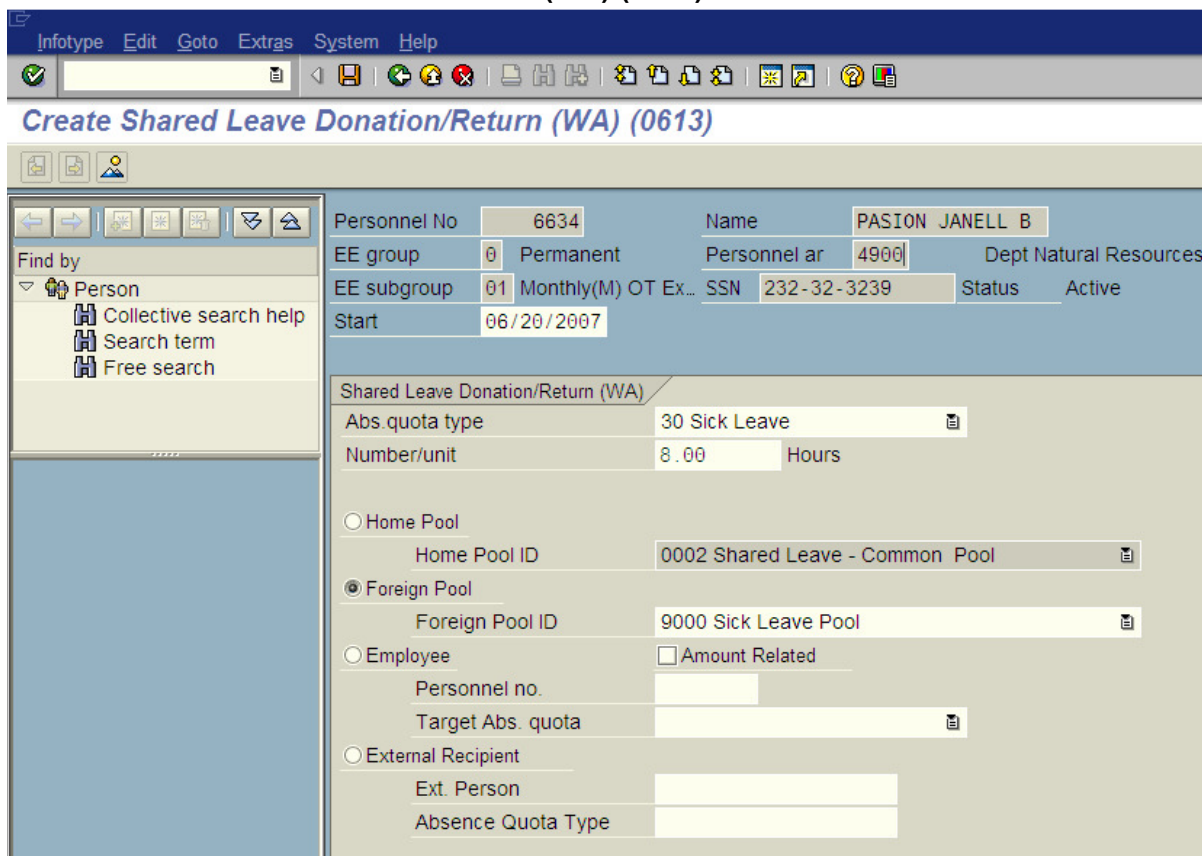
10. Click the ☐ Foreign Pool radio button to select.



The following message will appear if this radio button is selected before the Foreign Pool ID has been selected from the drop-down menu.


 Foreign pool is blank, please select a value.

Create Shared Leave Donation/Return (WA) (0613)



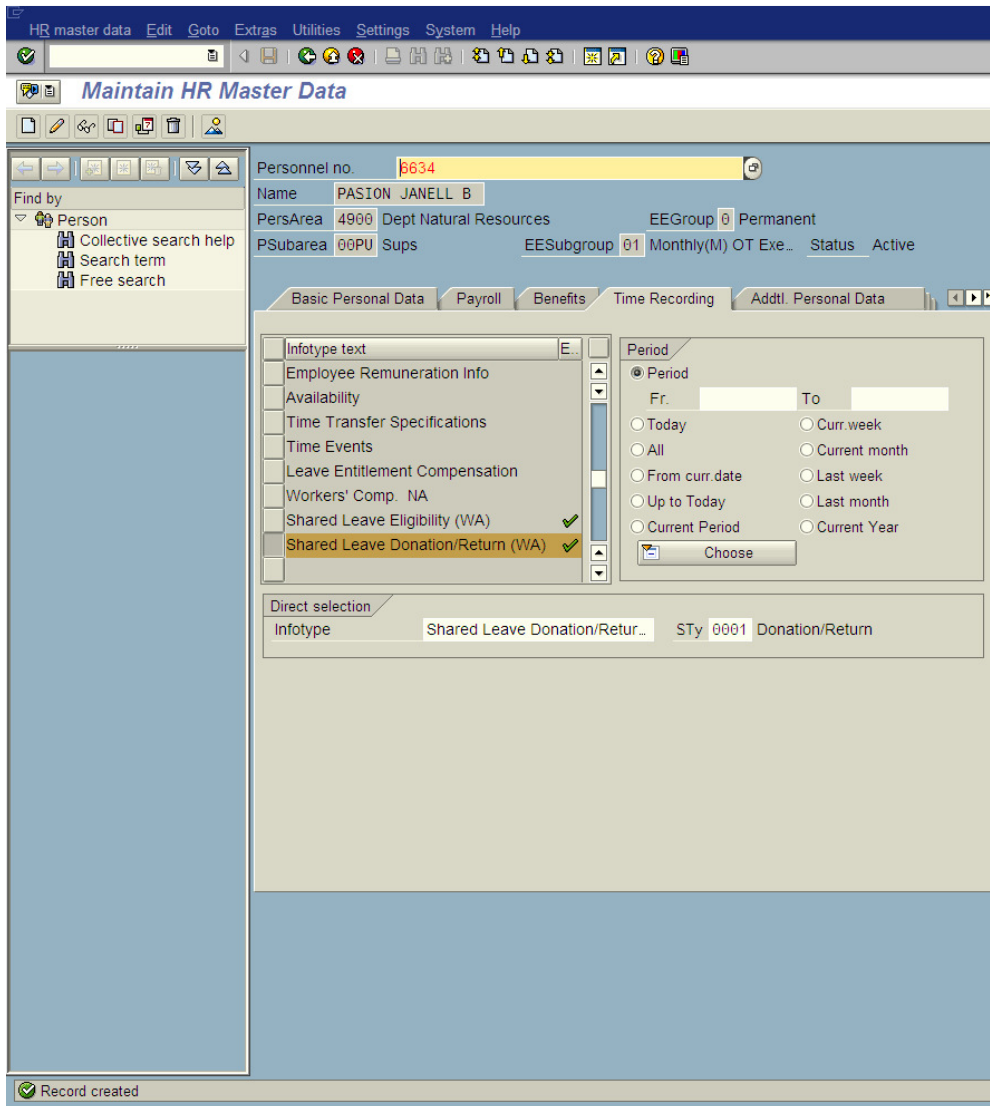
Personnel No 6634 **Name** PASION JANELL B
EE group 0 Permanent **Personnel ar** 4900 **Dept** Natural Resources
EE subgroup 01 Monthly(M) OT Ex... **SSN** 232-32-3239 **Status** Active
Start 06/20/2007

Shared Leave Donation/Return (WA)
Abs. quota type 30 Sick Leave
Number/unit 8.00 Hours
☐ Home Pool
 Home Pool ID 0002 Shared Leave - Common Pool
☒ Foreign Pool
 Foreign Pool ID 9000 Sick Leave Pool
☐ Employee ☐ Amount Related
 Personnel no.
 Target Abs. quota
☐ External Recipient
 Ext. Person
 Absence Quota Type

11. Click  (Enter) to validate the information.

12. Click  (Save) to save.

Maintain HR Master Data



Personnel no. 6634

Name PASION JANELL B

PersArea 4900 Dept Natural Resources EEGroup 8 Permanent

PSubarea 00PU Sups EESubgroup 01 Monthly(M) OT Exe... Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal Data

Infotype text E

Employee Remuneration Info

Availability

Time Transfer Specifications

Time Events

Leave Entitlement Compensation

Workers' Comp. NA

Shared Leave Eligibility (WA) ☒

Shared Leave Donation/Return (WA) ☒

Period

Fr. To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ Up to Today ☐ Last month

☐ Current Period ☐ Current Year

Choose

Direct selection

Infotype Shared Leave Donation/Retur... STy 0001 Donation/Return

Record created



The system displays the message, "Record created."

13. You have completed the transaction to donate to the Sick Leave Pool.

For the employee to receive leave for the Sick Leave Pool, perform the following steps:



14. Double-click **0002 Withdrawal** from the selection list.


Create Shared Leave Donation/Return (WA) (0613)

The screenshot shows the 'Create Shared Leave Donation/Return (WA) (0613)' form in the HRMS system. The form is titled 'Create Shared Leave Donation/Return (WA) (0613)' and includes a menu bar with options like Infotype, Edit, Goto, Extras, System, and Help. The main form area displays employee information for WASHINGTON GEORGE T (Personnel No 495160). Key fields include:

- Start:** 06/20/2007 (highlighted with a red box)
- Shared Leave Donation/Return (WA):** A section containing:
 - Abs.quota type:** A dropdown menu with a checkmark icon (highlighted with a red box).
 - Number/unit:** A dropdown menu with a checkmark icon (highlighted with a red box).
- Home Pool:** A radio button selected, with **Home Pool ID:** 0031 Shared Leave - Common Pool.
- Foreign Pool:** A radio button unselected, with **Foreign Pool ID:** (highlighted with a red box).

15. Complete the following fields:


Field Name	R/O/C	Description
Start	R	This is the date on which the record begins. Example: 06/20/2007
Abs.quota type	R	It is a specific absence quota, such as Annual Leave or Sick Leave.  Sick Leave Pool would be the appropriate option Example: 46 Sick Leave Pool
Number/unit	R	This is a combination of fields that defines the number to be compensated and the time unit, such as hours, days, weeks, etc.  Enter the amount of hours to be donated. Example: 8.0 (hours)

Field Name	R/O/C	Description
Foreign Pool ID	R	<p>For employees to be eligible to donate or receive shared sick leave, each should be assigned to a Foreign Pool ID.</p>  <p>This should be selected before clicking the Foreign Pool radio button. Sick Leave Pool would be the appropriate option.</p> <p>Example: 9000 Sick Leave Pool</p>

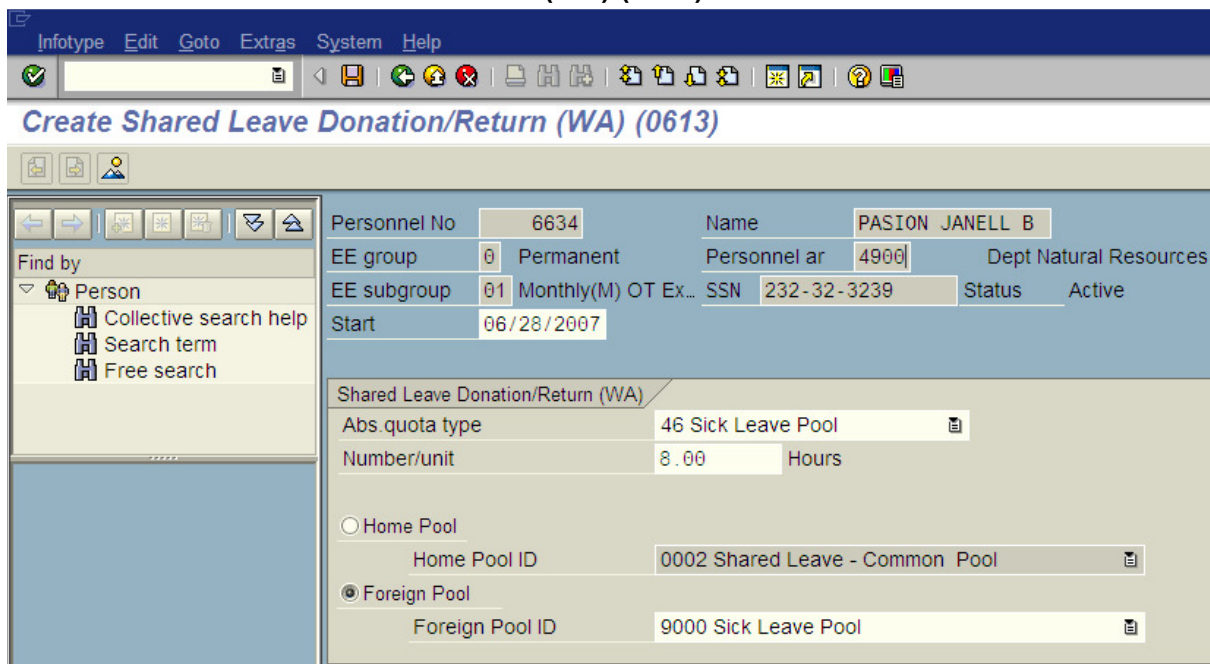
16. Click the ☐ Foreign Pool radio button to select.





The following message will appear if this radio button is selected before the Foreign Pool ID has been selected from the drop-down menu.

 Foreign pool is blank, please select a value.

Create Shared Leave Donation/Return (WA) (0613)



17. Click  (Enter) to validate the information.

18. Click  (Save) to save.



The system displays the message, "Record created."

- ## Result

Comments

Display Time Quota Compensation (0416)

Infotype Edit Goto Extras System Help

Display Time Quota Compensation (0416)

Personnel No. 6634 Name PASION JANELL B

PersArea 4900 Dept Natural Resources EGroup 0 Permanent

PSubarea 00PU Sups EESubgroup 01 Monthly(M) OT Exe_ Status Active

Start 06/20/2007 Chg. 06/20/2007 JANETP

Comp. method 1000 Free compensation

Compensation specifications

Time quota type 30 Sick Leave

Compensation rule 000

No. to compensate 8.00000

☒ Do not account

Compensation using default

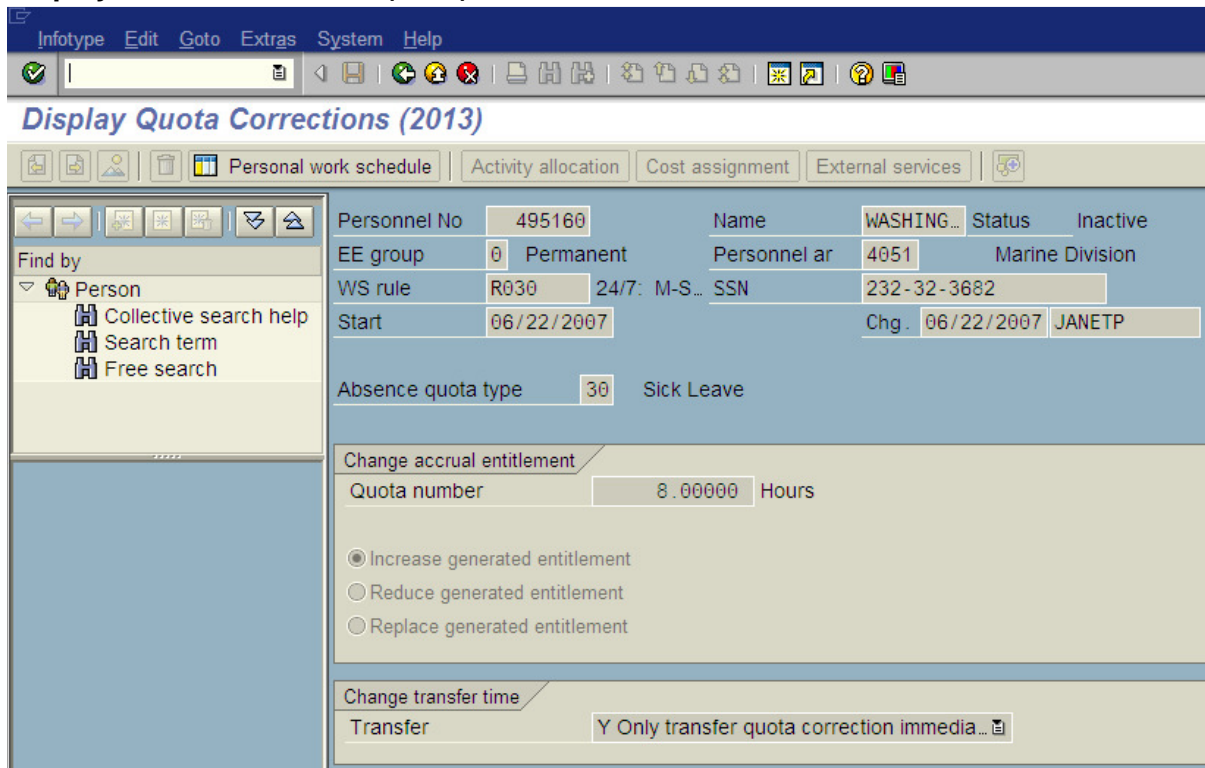
Manual compensation

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Amount	Curr...	Deduction fr...	Deduction to	Quota counter	
30	Sick Leave	301.70000	Hours	8.00000	237.70000		0.00		<input checked="" type="checkbox"/>	03/16/2006	12/31/9999	00000000000000612006

When a donation has been from the Sick Leave Pool, a Quota Corrections (2013) will be created for the recipient.

Display Quota Corrections (2013)



Display Quota Corrections (2013)

Personal work schedule | Activity allocation | Cost assignment | External services

Personnel No: 495160 Name: WASHING... Status: Inactive
EE group: 0 Permanent Personnel ar: 4051 Marine Division
WS rule: R030 24/7: M-S... SSN: 232-32-3682
Start: 06/22/2007 Chg.: 06/22/2007 JANETP

Absence quota type: 30 Sick Leave

Change accrual entitlement
Quota number: 8.000000 Hours

☒ Increase generated entitlement
☐ Reduce generated entitlement
☐ Replace generated entitlement

Change transfer time
Transfer: Y Only transfer quota correction immedia...